

SCHEDULE "A"

Edmonton Transit System Growth Strategy and Planning Review

TERMS OF REFERENCE

The City of Edmonton
Transportation Department

April 3, 2007

1.0 Introduction

During the past few years, the City of Edmonton has experienced rapid growth, which is expected to continue for a number of years. This growth has had a profound impact on the transit system, in terms of customer demands for more and better public transit services as well as impacts on the daily operation of the transit system. In addition, changes in demographics, social conditions and the availability of new technologies have created new challenges for Edmonton Transit.

In terms of present policies that govern the provision of public transit service in Edmonton, the Transportation Master Plan (TMP), approved by City Council in 1999, provided direction regarding the goals of Edmonton Transit. One of the main purposes of the TMP was to establish a framework for how the City of Edmonton would address its current and future transportation needs through to the year 2020. A major component of the TMP was the establishment of transportation policies that would guide the decisions and actions of the City of Edmonton, on behalf of its citizens, for transportation related issues. In addition to these policies, several transportation strategies and priorities were put forward for implementation.

As part of the TMP, public transportation was identified as an integral and important element of Edmonton's overall transportation system. The TMP recognized and recommended that transit continue to have an important role, but placed a sharper focus on the expectations of the public transit mode. Consistent with a clearly delineated role for public transportation, the following core service objectives were recommended:

- 1) Meet basic mobility needs of people who have no other travel alternative; basic service at reasonable cost;
- 2) Offer a viable and competitive alternative to private automobile transportation during peak periods of travel, in high demand corridors, and
- 3) Expand the carrying capacity of the public transportation system.

In the development of the TMP, a Transit System Review was conducted. As a result of that study, Horizon 2000, a new service strategy, was implemented in 1997 to deliver service that would better meet the travel needs of the citizens of Edmonton. Guidelines were also established to provide direction for the design and provision of service.

In the period since the TMP was approved, Edmonton Transit has experienced a significant growth in ridership. However, during this period, there has been a significant increase in the cost of operating the transit system, caused by increases in service levels as well as adjusting to a changing operating environment. In actual dollars, revenues have not kept pace with the increase in costs, which has led to concerns regarding the longterm financial sustainability of Edmonton Transit.

In addition, stakeholder input collected through the present Transportation Master Plan update process indicated support for the three core service objectives identified for transit in the existing TMP. However, while there is consistent support for the role of transit to meet basic mobility needs, there is no clarity about the standard of service required to meet basic mobility needs. Further, stakeholders commented that although they support the core service objective of transit to offer a viable and competitive alternative to the private automobile during peak periods on high demand corridors, they do not believe that this objective is being met under the existing transit system. All stakeholders gave a strong message regarding the importance of transit and the need to improve the public transportation system to address

the changing needs of the community and to capture what they consider to be largely untapped markets, although these markets were not identified by the stakeholders.

2 STUDY PURPOSE

The primary objectives for the study:

Identification of existing and potential markets for public transit. An assessment of Edmonton Transit's effectiveness in providing service to meet market needs. Develop strategies for increasing penetration into each market, identifying costs and ridership/revenue potential associated with each market.

Service Guideline Review – Recommend service guidelines for Edmonton Transit System and the impacts of applying the recommended guidelines on costs, revenue and ridership (for each market previously identified)

Assess specific aspects of the transit planning and operations, providing assessments of existing practices and policies and recommendations for future initiatives in the identified areas.

Five Year Plan – Develop a 5 year service and infrastructure implementation plan and schedule, which will be used as the basis for development of Edmonton Transit's Long Range Financial Plan and feed into the Transportation Master Plan Update.

Identify ten year issues and options for consideration in the Transportation Master Plan update.

3 PROJECT MANAGEMENT

The project management framework, as shown in Figure 1, follows the general project management guidelines established in City Policy A1424A, Project Management for Projects. For the purposes of this study the overall responsibility for the management of this project resides with the Steering Committee, and ultimately the chair of the Steering Committee. Supporting and reporting to the Steering Committee will be the Project Manager, City staff resources, and the selected Transportation Consultant.

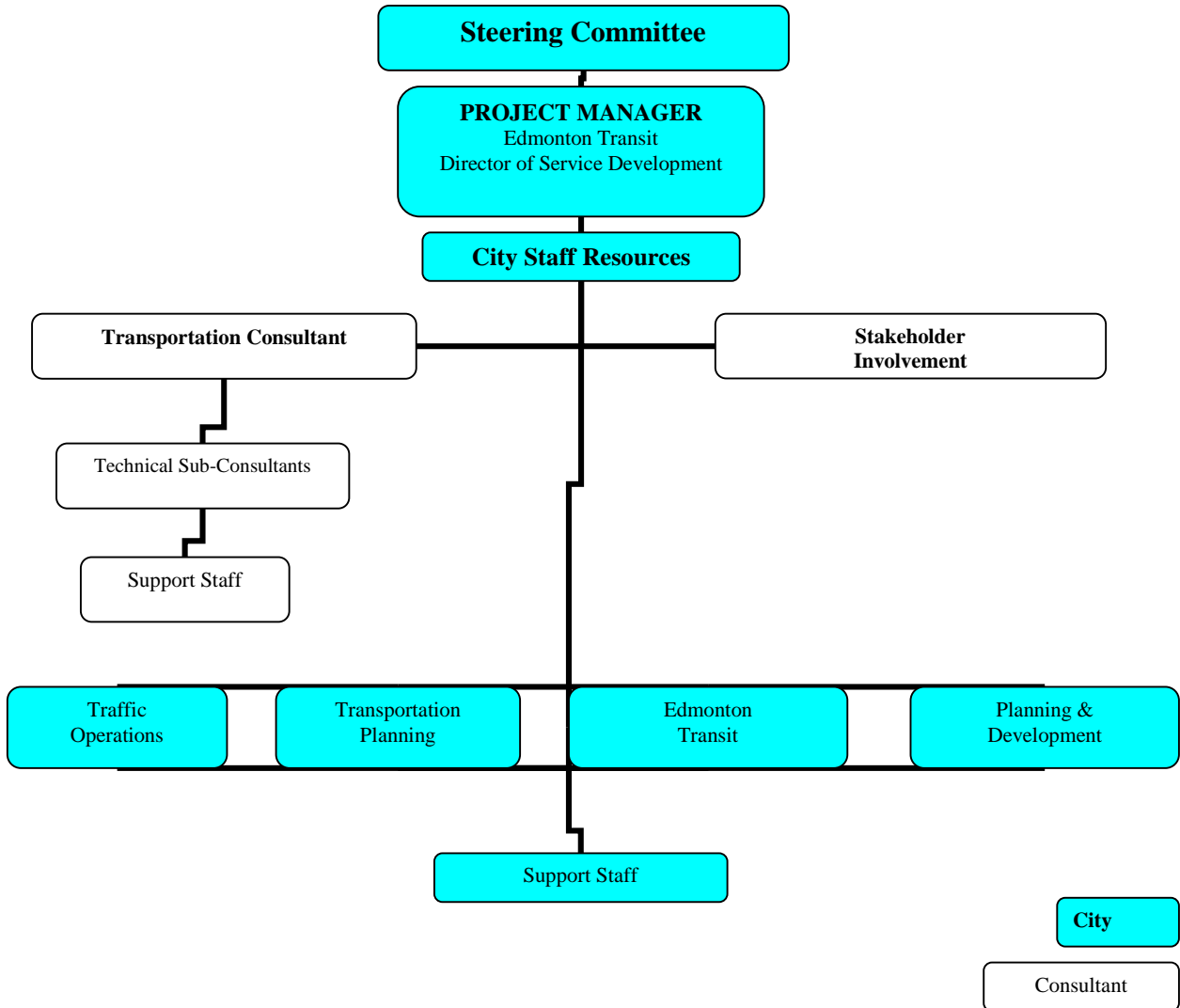


Figure 1 - Project Management Structure

3.1 Steering Committee

The Steering Committee will provide direction to the overall project manager, working team and Consultants. The Steering Committee for this project will be the Transportation Master Plan Steering Committee.

The selected Transportation Consultant's Project Manager(s) will also attend the Steering Committee meetings as required to provide reports on the progress of the Comprehensive Public Transportation Strategy.

3.2 Project Manager

The project manager will be responsible for the day-to-day communication with the Transportation Consultant and the project administration. The project manager will follow direction from the Steering Committee and will coordinate with staff from throughout the City administration to enable the Transportation Consultant to carry out the Study.

3.3 Additional Project Support

It is anticipated that input will be required from various areas of the City Administration, including all areas of Edmonton Transit, the Transportation Planning Branch, Traffic Operations Branch, Mobile Equipment Services and the Planning and Development Department. Requests for information and input to these areas will be coordinated through the Project Manager.

3.4 Transportation Consultant(s)

The Transportation Consultant(s) will be responsible to complete the study as per the components itemized in Section 4. The consultant will liaise with the project manager and be available to report to the Steering Committee as required. A collaborative effort may be required with City of Edmonton staff on specific aspects of the project. The Transportation Consultant shall provide interim, final reports and deliverables as identified.

4 STUDY OBJECTIVES AND COMPONENTS

4.1 Document Review

A number of relevant documents provide background information for the development of a future public transportation system and should be reviewed. Suggested documents include:

- Transportation Master Plan (1999)
- Plan Edmonton
- 2005 Household Travel Survey
- IBI Edmonton Transit System Review (1995)
- Horizon 2000 (1996)
- Fare Policy and Strategy (2007)
- ETS Business Plan
- ETS Strategic Marketing Plan (2006)
- Fleet Replacement Strategy
- Considerations for Service Changes

- High Speed Transit Concept Plan (2004) and additional work undertaken on corridor studies presently underway
- ETS Customer Satisfaction Surveys
- Long Range Facility Study – IBI (2006)
- City Manager’s Review of DATS (2002)
- ACRA Regional Transit Study (2002)
- Transportation Department ITS Strategy
- Security Best Practices Report (2004)
- Edmonton Regional Plan for Coordination of Youth Services (2004 – 2007)
- CUTA STRP 18 – A Handbook of Innovative Transit Services to Serve Market Niches (2001)

4.2 Existing Transit System Effectiveness and Opportunities

The consultant will be expected to undertake a comprehensive review and provide an analysis of the existing transit system (including DATS).

- Review existing and future travel patterns in the city and region
- Review existing demographic characteristics of the city and region
- Identify future trends and the potential impacts on public transit (in terms of service and customer expectations)
- Identify existing and potential transit markets
- Determine Edmonton Transit’s effectiveness in serving each market
- Identify strategies and system improvements required to increase ridership in each market. Changes could include implementation of new technologies or other infrastructure enhancements such as corridor improvements and other transit priority measures.
- Identify costs, infrastructure requirements and ridership/revenue impacts of strategies and system improvements for each market.

The review should identify:

- Immediate implementation
- 5-year priorities
- The potential role of City to promote transit supportive land uses, for input into the Transportation Master Plan update

4.3 Service Standards Review

The study must review the role of Transit in Edmonton and the existing service standards.

- Review service standard from other cities and provide a comparison to Edmonton.
- Suggest service standards that would be applicable for the Edmonton operating environment. The service standards identified must be measurable.
- Identify potential costs/savings and ridership/revenue impacts if the suggested standards are applied (should identify these impacts for each of the markets identified above)

- Transit service standards should include (but not be limited to):
 - Walking distance by land use and time period (and where possible, market segment)
 - Hours of service (by time of day, day of week)
 - Maximum trip times/Average trip times/wait times
 - Frequency of service (by time of day, day of week)
 - Accessibility standards – vehicles, bus stops and other related infrastructure
 - Bus loading (for both low and high ridership level situations)
 - Transfers
 - Modal integration (Bicycles and pedestrians)
 - Vehicles and vehicle maintenance standards
 - Customer amenities and maintenance standards (transit centres, bus stops, shelters)
 - Staging service to new areas
 - Consideration of different standards for inner city and suburban neighbourhoods
 - Maintaining service in areas based on minimum population or employment levels or land uses
 - Revenue, cost and tax levy criteria for adding or removing service (reference OC Transpo service standards)

The study should also identify measures/indicators that should be used to measure the effectiveness of Edmonton Transit, for use by city administration as well as for reporting to City Council.

- Financial targets and performance criteria
- Other performance indicators
- Mode share, ridership

4.4 Service and Infrastructure Assessments

Specific areas of review and products required from the consultant include:

- Analysis to indicate whether city taxpayers are receiving good value for the funds being invested into the operation of transit service. Identify opportunities for achieving cost efficiencies and where appropriate, the impacts on transit passengers and businesses.
- Value of School Services relative to the remainder of the transit system (cost vs. demand, planning approach, school board policies)
- Opportunities for expanded use of articulated buses beyond 2008 (guidelines for use, routes, costs, passenger and community impacts, infrastructure requirements)
- Provide strategies related to the future mix of vehicle types to be used by Edmonton Transit (standard bus configuration, community shuttles, articulated buses, LRT)
- Identify and confirm requirements for new or expanded bus garages and LRT facilities
- Assessment of service planning philosophy, including the timed transfer system. Confirm transit service and supporting infrastructure requirements over a ten year period.
- Assess service issues, impacts and requirements related to growth in the city and region, specifically schedule issues resulting from increased congestion. Recommend strategies to address these issues, including potential ITS measures and transit priority measures in corridors or specific locations.
- Assess the adequacy of service monitoring information and practices and provide recommendations (including cost and resource requirements) for improvements in this area.

- Recommended corridor improvements and ITS applications that would improve efficiency, effectiveness and customer service provided by Edmonton Transit over the next ten years.
- Identify opportunities for integration of regional public transit services and integration with other intercity modes of travel (train, bus, and plane).
- Adequacy of on-road support resources (Standards for number of security and on-road supervisory personnel per hour or passenger trips)
- Opportunities for expanded application of ITS by Edmonton Transit, including “smart-bus” applications and customer information applications.
- Develop and assess options for feeder and complimentary bus service in conjunction with the South LRT extension to Southgate and Century Park. Options should include maintain existing route network structure, increased use of community shuttles, higher frequency of service and other suggestions that are identified through stakeholder involvement.

4.5 5 Year Plan

As noted earlier, the Transportation Department is undertaking an update of the Transportation Master Plan, with a horizon year of approximately 2040. The Transportation Master Plan establishes a framework for how the City of Edmonton will address its future transportation needs. The TMP sets policies within the broader context of the land use planning goals as outlined in the City’s Municipal Development Plan (MDP). The TMP update is being developed concurrently with the new MDP – Focus Edmonton.

While a longterm service strategy cannot be developed until the vision for the City’s transportation system and the roles for public transit have been established, service and infrastructure requirements can be identified for the upcoming five year period for use in the preparation of the Capital Priorities Plan for Edmonton Transit.

The consultant should prepare a five year implementation plan, identifying infrastructure and service requirements as well as cost, ridership and revenue expectations. This would involve obtaining input from all areas of Edmonton Transit to identify potential initiatives being contemplated as well as the costs and potential benefits (customer service, ridership and revenues, efficiencies).

4.6 Longer Term Initiatives

While the focus of this project is on short-term initiatives, further initiatives are possible in the longer term as more funding becomes available and demand for public transit services triggers the need for investment in the system. Based on study findings, the consultant will identify further initiatives that would assist in developing a larger ridership base in Edmonton. These initiatives will be considered through the Transportation Master Plan process.

4.7 Stakeholder Consultation

As part of the review process, input and feedback should be obtained from key stakeholders, including members of City Council, the City’s Senior Management Team, representatives of community and

business groups, the Edmonton Transit System Advisory Board and representatives of unions representing Edmonton Transit staff. Stakeholder consultation will occur upon project initiation, and at the completion of work identified in Sections 4.2 to 4.6. Stakeholder involvement must be coordinated with work that is being undertaken through the TMP to avoid duplication and overuse of stakeholder pool.

In addition, an opportunity will be made available for issues to be raised by individual neighbourhoods through contact with Community League representatives. Issues raised from this source should be documented, with recommendations made to address those concerns.

5 PROJECT DELIVERABLES

The Consultant will provide study reports, documenting findings and recommendations from tasks identified in Sections 4.2 to 4.6 of the Terms of Reference. Each study report will include a summary of stakeholder feedback related to the findings and recommendations from that phase of the study.

- Report outlining existing transit system effectiveness in meeting the needs of various markets, opportunities for increasing ridership in each market, including immediate and intermediate implementation strategies, recommended priorities and communication/marketing recommendations for attracting riders in each identified market. The report will also include costs, infrastructure requirements and ridership/revenue impacts of strategies and system improvements related to each market.
- Report outlining recommended transit service standards and impacts of implementing the recommended standards
- Report documenting the findings of service and infrastructure assessments, identified in Section 4.4.
- Report documenting the five year service and infrastructure implementation plan.
- Report identifying longer term initiatives aimed at increasing transit ridership.

In addition, a final report will be prepared, which will include a consolidation of study findings and recommendations.

Note that the various study reports may be combined, subject to approval by the Project Manager.

6 PROJECT ADMINISTRATION

6.1 Progress Reports

The selected Transportation Consultant shall submit progress reports on a monthly basis to the Project Manager one week prior to the Steering Committee meetings. Reports shall outline a summary of the progress over the last month, an updated schedule (if required) and an outline of the work to be undertaken over next month.

The selected Transportation Consultant's project manager will attend specific Steering Committee meetings to present progress report and to answer questions from the committee.

6.2 Study Reports

Once the Steering Committee has accepted the draft study reports, the Transportation Consultant will provide to the City:

- Fifteen (15) bound copies of the Reports, and
- An electronic copy of the Reports on CD-ROM

6.3 Final Report

Once the Steering Committee has accepted the draft final report, the Transportation Consultant will provide to the City:

- Fifteen (15) bound copies of the Final Report,
- Fifteen (15) bound copies of an Executive Summary, and
- An electronic copy of Final Report and Executive Summary on CD-ROM

6.4 Billing Procedure

Invoices shall be submitted on a monthly basis. All invoices shall include the following:

- Breakdown of hours spent by team members for each task
- Breakdown of dollars invoiced by team member for each task
- Total amount invoiced to date and balance of budget

Invoices that do not contain this information will not be processed, but will instead be returned for revisions and resubmission.

7 PROJECT SCHEDULE

The Study will commence in February, 2007 and is to be completed by December, 2007.